

Writing a Technology Plan

Below is a basic outline to follow while writing a technology plan. A technology plan can be written in a variety of formats, but following a template or outline is often helpful for those who are just starting. Before your library embarks on writing a technology plan, it is recommended that libraries create a Technology Plan Team, and perform a Technology Assessment that reviews all aspects of technology within the library. More information about forming a Technology Plan Team and a Technology Assessment can be found on the State Library of Ohio's WebJunction site.

Introduction/Overview

Technology plans are written for your library's use, but are sometimes read or reviewed by people not actively involved in the technology planning process, or persons outside the library's system (like a Certified E-Rate Technology Plan Approver).

Provide general information about the library such as location, population served, basic history, and other pertinent information such as if your library recently renovated or upgraded its catalog.

Also provide basic information about how the technology plan was developed. Who was included in creating the technology plan (the Technology Plan Team), why have you created the technology plan, or any large projects (for example physical renovations) the library is embarking on.

Mission and Technology Vision Statement

Include your library's Mission Statement in the technology plan, and a Technology Vision Statement. The library's technology goals and objectives you are creating should focus on meeting the library's mission and technology vision.

The Technology Vision Statement should reflect the interest of various stakeholders (patrons, staff, board members, etc.) and paint the picture of how the library will function with the mission-driven use of technology. It can also be the ideal scenario for technology in the library or where the library wants to be.

If the library does not already have a Technology Vision Statement, involve the Technology Planning Team in creating one referring to the library's Technology Assessment. Questions to ask include:

- What is working in each program?
- Where are opportunities for growth?
- If resources were no concern, what would be different?
- What would technology and training do for the staff?
- What would technology do for the patrons?

Executive Summary

Not all technology plans need an executive summary. If your technology plan is longer than 4-6 pages create a summary highlighting major goals or initiatives. Depending on the level of detail and length of the technology plan the summary can be incorporated into the introduction/Overview section.

Background and current state of technology

The background and current state of technology is where you will include information from your technology assessment. As briefly as possible include information about how technology is currently being used.

The summary can include if there are any major technology projects your library is embarking on, and what the current technology environment. Some questions to ask an answer include:

- Where is technology being used
- How is it integrated into every-day use
- Are there any strengths or weaknesses
- What is the current level of staff expertise?
- How is technology being used by patrons?
- Budget information
- Include brief Inventory information (If the library has an extensive inventory it can be listed in the appendix)

Goals and Objectives

Goals and Objectives are the direction the library will take to maintain, improve, and expand service to patrons and staff using technology. This is often the most challenging part of writing a technology plan, but by stating goals and objectives your library now knows which direction it is headed, what path to take, and when it will happen.

When thinking about goals for your library, review your library's technology assessment. Are there any weaknesses in the assessment? These could be things such as lack of basic technology knowledge by staff, low public computer program attendance, outdated computers or computer systems, or a slow internet connection. Try to anticipate future needs, staffing levels, and use of library resources.

Make goals and objectives realistic. Are they something your library can accomplish within the given timeframe? Does your staff have the skills to perform the task, or the time and resources to learn needed skills? Does your library have the resources to accomplish the goal, such as money or staff-time?

Goals and objectives are not the same thing.

Goals are broadly written and are driven by your library's technology vision statement, but are more defined intentions. They are directed toward specific groups of people or topics and are not connected to a timeline. They can include maintaining or enhancing current services and be part of a larger library goal, or strictly technology oriented. For example making the collection more accessible is a larger library goal, but would include upgrading or

implementing a new ILS. Whereas, upgrading public access computers are a technology oriented goal.

Objectives are the specific steps the library will take to accomplish the goals. Objectives should be measurable, include specific timetables for action, information about who will be performing actions, budget information, and can include specific technology needed to meet the goal.

Goals and Objectives should be SMART:

- **Specific** – clearly state what needs to be done.
- **Measurable** – refer to specific evaluation measurements to gauge success.
- **Attainable** – make sure there are sufficient resources (time, money, staff, etc.) to achieve goals and objectives.
- **Relevant** – Do the objectives support the goal, and the goal meet the library's mission and technology vision statement?
- **Time bound** – When will each objective be completed or measured/evaluated?

Evaluation

All technology plans must include an evaluation process.

Even if a library has wonderful goals and objectives, without an evaluation plan there will be no way to see if the goals and objectives are being met, and if they are not, what action needs to be taken to resolve any issues.

The evaluation section of the technology plan should discuss how often evaluation of the plan will take place. Plan evaluation should be ongoing, but delineate specific time periods it will definitely be looked at, for example monthly or quarterly. One of the easiest ways to evaluate the technology plan regularly is to integrate it into every day library functions such as staff or board meetings.

Next, you need to determine how goals and objectives will be evaluated. Some examples include: monitoring program attendance, more patrons are attending programs; measure the workplace productivity, for example staff are able to complete more tasks because the computers are newer and faster; completion of technology courses by staff, for example a certain number of staff attend technology related courses by a certain date; outcome based, your library has replaced all of its old machines by a certain date; or surveys and statistics.

After the evaluation of the goals and objectives, what action will be taken if they haven't been met?

Finally include information about when the technology plan will be reviewed and revised in its entirety, and who will be involved with its evaluation (for example the Technology Plan Team or specific staff members.)

Appendices

Finally include any appendices if needed. This can include your library's technology inventory or timeline charts for meeting and evaluating goals and objectives.